DOCUMENT RESUME

ED 431 462 JC 990 384

TITLE	Salem Community College Unit Planning Workbook.
INSTITUTION	Salem Community Coll., Penns Grove, NJ.
PUB DATE	1999-07-20
NOTE	40p.
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Community Colleges; *Community Involvement; *Decision Making Skills; *Educational Planning; Evaluation Methods; *Organizational Change; Personnel Evaluation; *Strategic Planning; Two Year Colleges

ABSTRACT

This unit planning workbook is designed to serve as an implementation guide for managing the strategic planning initiatives articulated in the 1999-2003 Strategic Plan. Salem Community College's strategic plan aims towards allowing the college to enter the 21st Century as an active agent in the advancement of the Salem County community. This workbook is written as a combined unit planning process and Strategic Planning Management Plan that aims to empower the community to reflect on the past, present, and future of SCC, and to systematically discuss its newly defined vision, mission, values, and goals. The manual illustrates a twenty-point system of implementing the strategic plan, through the development of both a framework for and a process of unit planning. Salem College's newly adapted organizational framework is "heterarchy," which embraces the ideas of emergence and complexity. The twenty key points for implementing the 1999-2003 Strategic Plan are subdivided into five central themes: (1) Establish Accountability, (2) Adjust the Institution, (3) Teach Ourselves, (4) Empower All, and (5) Evaluate and Reward. The unit planning process is divided into five areas for articulating these goals: (1) Develop Direction, (2) Identify Priority Actions, (3) Summarize Action Plans, (4) Report Priorities, Objectives, and Interdependence, and (5) Develop and Strategy. Contains 12 references. (JJL)

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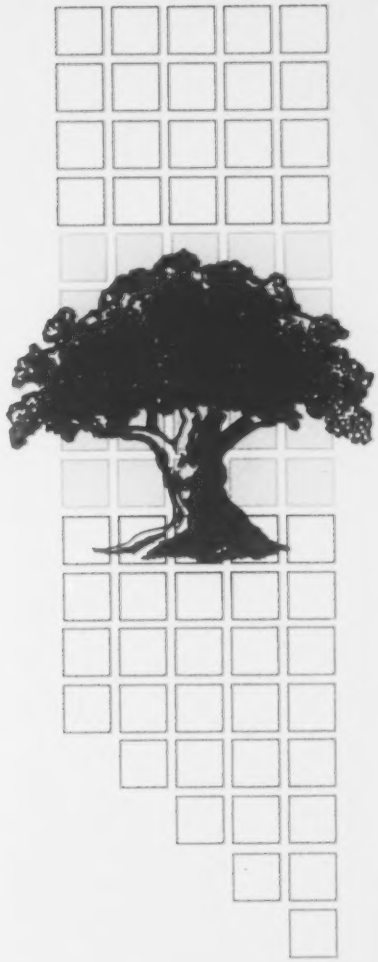
Salem Community College



Unit Planning Workbook

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UNIT PLANNING DEVELOPMENT WORKBOOK

INTRODUCTION

Salem Community College's strategic planning initiative has permitted the college to implement a process that will allow SCC to enter the 21st Century as an active agent in the educational advancement of the Salem County community. The Unit Planing component of strategic planning will allow college administration, faculty, and staff to diligently reflect on the outcomes of the strategic plan development phase of institutional planning.

The unit planning process can empower the College community to reflect on the past, present, and future of SCC and to systematically discuss its newly defined vision, mission, values, and goals. Each College unit will work through a collaborative process to evaluate the impact and influence of the vision, mission, values, and institutional goals on the functions and goals of each unit. Unit planners will work to evaluate the structures, procedures, practices, and processes currently in place and will recommend necessary changes, improvements, developments, and enhancements in light of the 1999-2003 Strategic Plan.

This Unit Planning Workbook is designed to serve as an implementation guide for managing the strategic planning initiatives articulated in the 1999-2003 Strategic Plan. This workbook is written as a combined unit planning process and Strategic Planning Management Plan. It illustrates a twenty point system of implementing a strategic plan, through the development of both a framework for and process of unit planning. The twenty key points for implementing the 1999-2003 Strategic Plan are subdivided into five central themes:

1. Establish Accountability (Figure #4)
2. Adjust the Institution (Figure #7)
3. Teach Ourselves (Figure #5)
4. Empower All (Figure #6)
5. And, Evaluate & Reward (Figure #8)

The unit planning process is divided into five areas for articulating these goals:

1. Develop Direction
2. Identify Priority Actions
3. Summarize Action Plans
4. Report Priorities, Objectives, and Interdependence
5. Develop a Strategy

Through the combination of a management strategy and a unit planning process, the goals of the 1999-2003 Strategic Plan can be fully realized.

Strategic Planning at SCC

Throughout the 1998-1999 academic year, the Salem

Community College community worked diligently to establish a new vision for the future, a mission to guide all present and future initiatives, and a set of seven values to guide college decision making and planning. The vision, mission, and values are presented below:

Vision Statement

> To provide personalized educational opportunities that unlock the potential of all generations.

Mission Statement

> We at Salem Community College believe that your success is our success. Our commitment is to provide quality and affordable education in a dynamic learning environment through personalized services to a diverse community.

Salem Community College's Strategic Values

1. Effective Teaching, Learning, & Assessment.
2. Expansion of Partnerships, Offerings, & Outreach.
3. Progressive Marketing, Enrollment Management, & Retention.
4. Revenue and Human Resource Optimization.
5. Enhanced Information Technology Infrastructure.
6. Progress and Growth in the Physical Infrastructure.
7. Elevated Internal and External Communication.

The vision, mission, and values of Salem Community College should serve as a benchmark in developing unit plans. Planning at Salem Community College is viewed as a

participatory process where all stakeholders are given an equal stake in the success of the College.

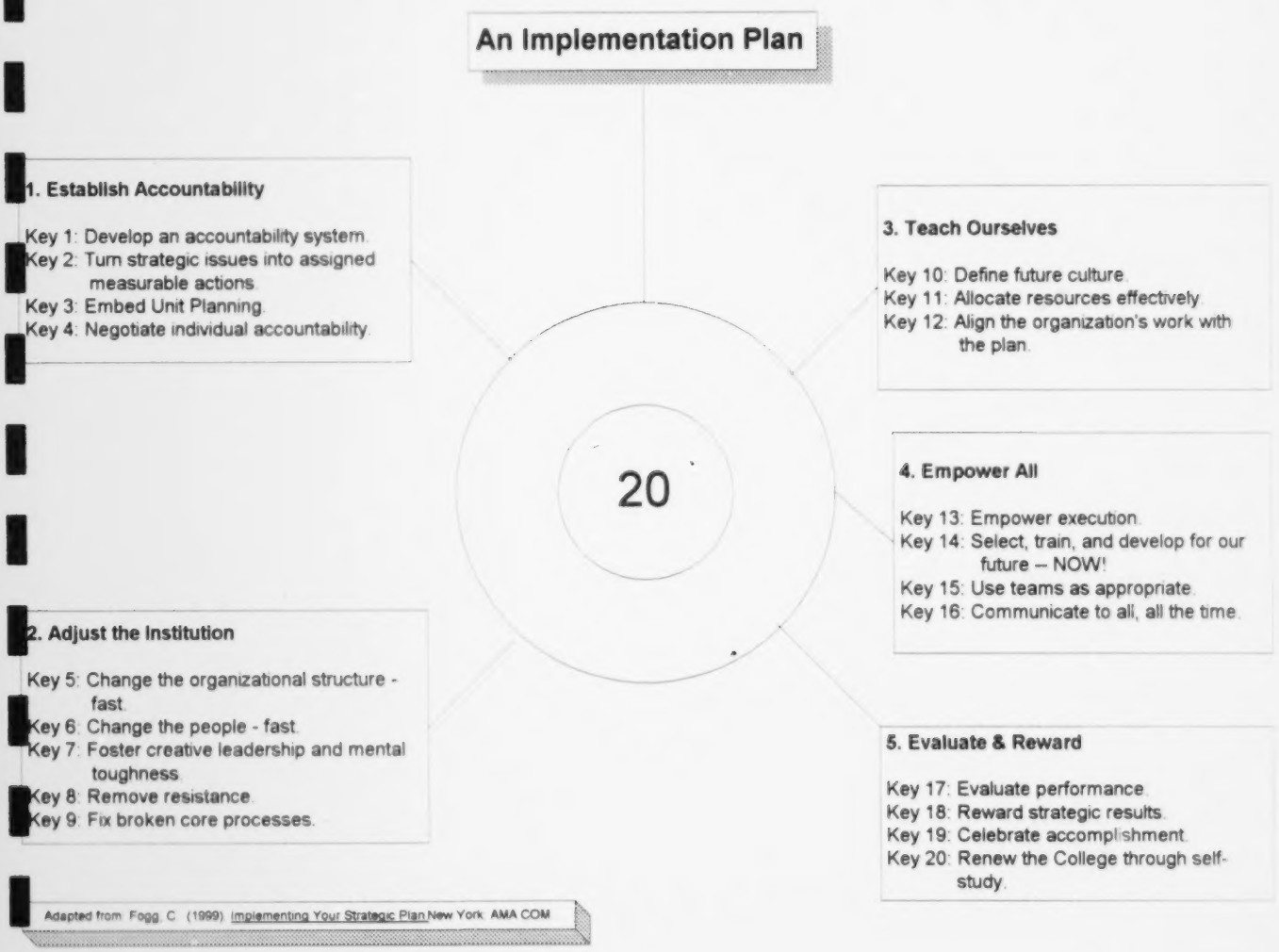
Implementing the Strategic Plan

The key to successful plan implementation is the realization that each member of the Salem Community College community is vested and interested in the success of the College. This unit planning process is designed to meet such a goal. This process was designed with the realization that the 1999-2003 Strategic Plan can be implemented if College leadership will effectively orchestrate and direct a diverse range of people, resources, programs, and actions over the next three years across a number of organizational boundaries (Fogg, 1999).

It is critical for the Salem Community College unit planning process to incorporate twenty key factors into implementing the 1999-2003 Strategic Plan. These twenty factors are illustrated in Figure #1 below. Overall, the unit plans should assist in the development of a systematic accountability system; the positive reallocation of college resources and personnel coupled with the redefinition of duties and structures; the re-articulation of the College's culture; the empowerment of all existing staff; and the strategically based evaluation and reward for results.

Figure #1

Twenty Key Points for Strategic Plan Implementation


An Implementation Plan
1. Establish Accountability
Key 1: Develop an accountability system.
Key 2: Turn strategic issues into assigned measurable actions.
Key 3: Embed Unit Planning.
Key 4: Negotiate individual accountability.
2. Adjust the Institution
Key 5: Change the organizational structure - fast.
Key 6: Change the people - fast.
Key 7: Foster creative leadership and mental toughness.
Key 8: Remove resistance.
Key 9: Fix broken core processes.
20
3. Teach Ourselves
Key 10: Define future culture.
Key 11: Allocate resources effectively.
Key 12: Align the organization's work with the plan.
4. Empower All
Key 13: Empower execution.
Key 14: Select, train, and develop for our future – NOW!
Key 15: Use teams as appropriate.
Key 16: Communicate to all, all the time.
5. Evaluate & Reward
Key 17: Evaluate performance.
Key 18: Reward strategic results.
Key 19: Celebrate accomplishment.
Key 20: Renew the College through self-study.

Adapted from Fogg, C. (1999) Implementing Your Strategic Plan New York: AMA COM

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Hierarchy and Heterarchy

In attempting to understand Salem Community College and its goal of organizational transformation it might be beneficial to examine the role of structure and social relations within organizations in general. Kontopoulos has demonstrated that the logic of structures has developed along five basic epistemic strategies: reductionism, constructionism, heterarchy, hierarchy, and trancendence/holism. Kontopoulos further suggests that emergent heterarchy appears the most robust and most practical epistemological approach for understanding social structure and thus organizational structure.

> "A theory of structures is, by necessity, a theory of levels. Different levels of structural analysis imply different units of analysis, which in an ascending order become dynamically different (in scale), larger (in size), and more complex (in information or entropic complexity). As we have already said, however, the relation between these units is not one of complete inclusion or suppression as one would expect in a hierarchical organization - something more complex takes place here, as the levels interrelate to each other in an 'entangled' way. (Kontopoulos, 1993, p. 287)

This epistemological theory of heterarchy demonstrates that organizational understanding should be shifted to embrace the ideas of emergence and complexity. It is this emergent complexity which should then be considered in any attempt

to understand organizational change, which is related directly to organizational structure and culture.

Lawler further emphasizes these points in his book, From the Ground Up. He demonstrates that "Hierarchy is being dramatically reduced. It is increasingly common for large organizations to have single-digit management levels and double- or triple-digit reporting relationships." (Lawler, 1996, p. 5). Lawler argues for the notion of a "New Logic Corporation," where the key to organizational effectiveness is within a lateral process striving for involvement of employees who add significant value. To Lawler, then the key comes in the development of the organization itself, through the empowerment of human resources. Lawler's epistemological strategy is (without ever being named as such) one of emergent heterarchy.

Figure #2 below demonstrates Salem Community College's official organizational chart (i.e., a traditional hierarchy); Figure #3 demonstrates how an emergent heterarchy in higher education might appear. A heterarchy is emergent, transformational, empowering, and in a constant state of change over time (i.e., dynamic). For Salem Community College to be successful, it should embrace the structural form of heterarchy in management and leadership practice.

Figure #2

Organizational Hierarchy

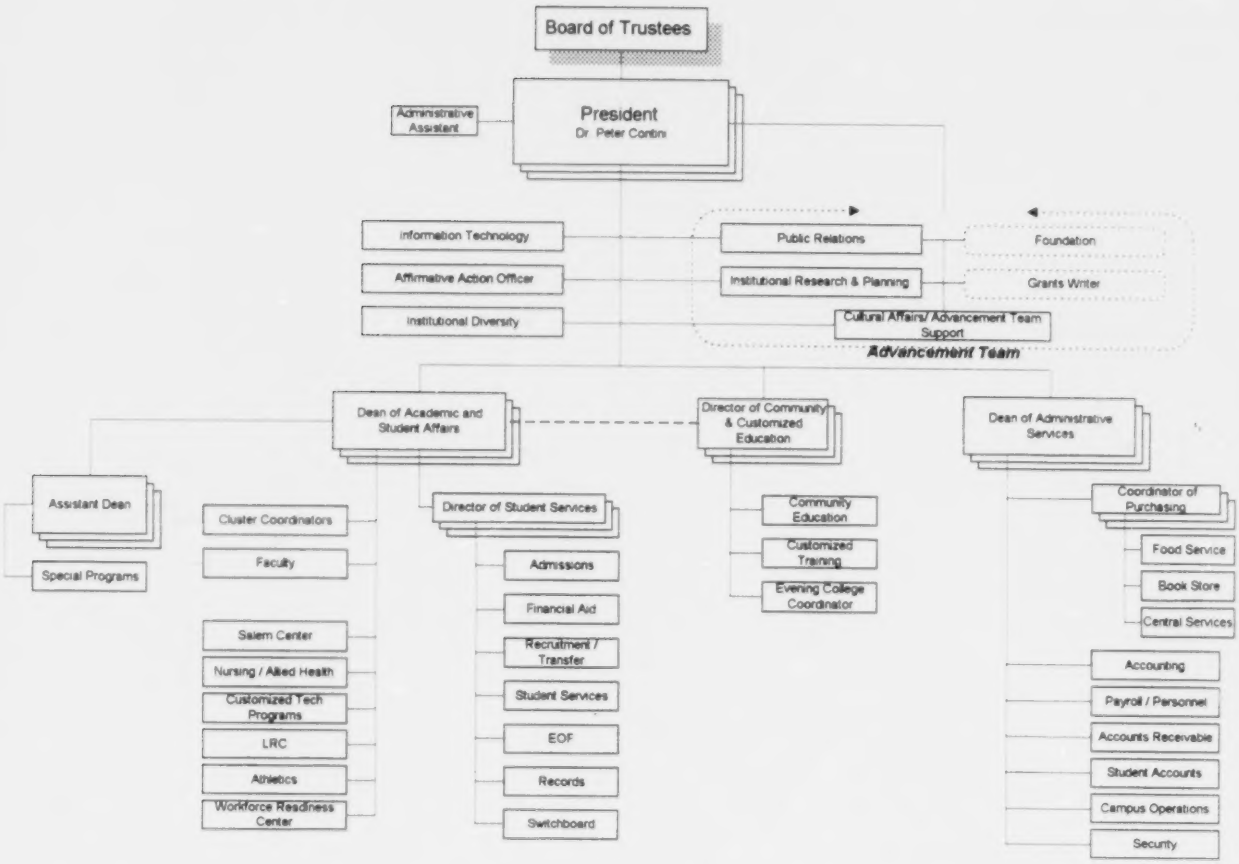

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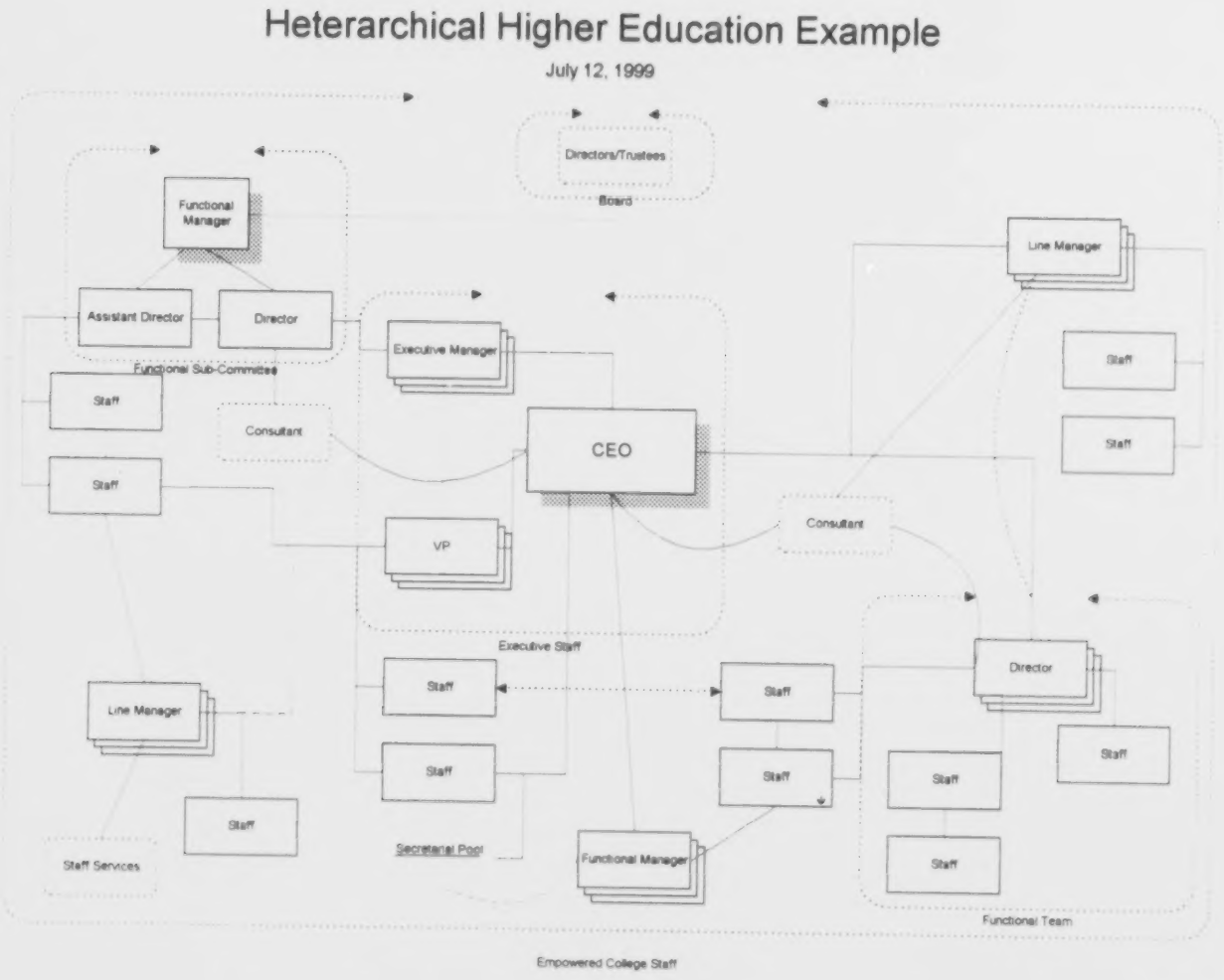
Figure #3

A Heterarchical Organization



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The Unit Planning Process

Salem Community College will embark on the next phase of its long-term continuous strategic planning efforts (i.e., Unit Planning). Unit Planning was created as an emergent, participatory, collegial, heterarchically based planning model to assist in the implementation of the Salem Community College 1999-2003 Strategic Plan. The objective of this planning process is to ask the current staff to achieve operating and strategic performance standards that are significantly higher than those expected in the past. The unit Planning Process is the road map for improving performance (individual, operational, and institutional).

The Three Level Accountability Structure

An essential key area of strategic plan implementation is the development and emergence of an inherent accountability system. A fair impartial accountability system serves as a form of motivation that influences the performance of all staff members. It serves as a means for systematic annual evaluation, and serves as a guide for what the organization can reasonably accomplish.
Figure #4 below, illustrates a three level accountability structure for Salem Community College. Level #1, demonstrated by the inner circle, represents accountability

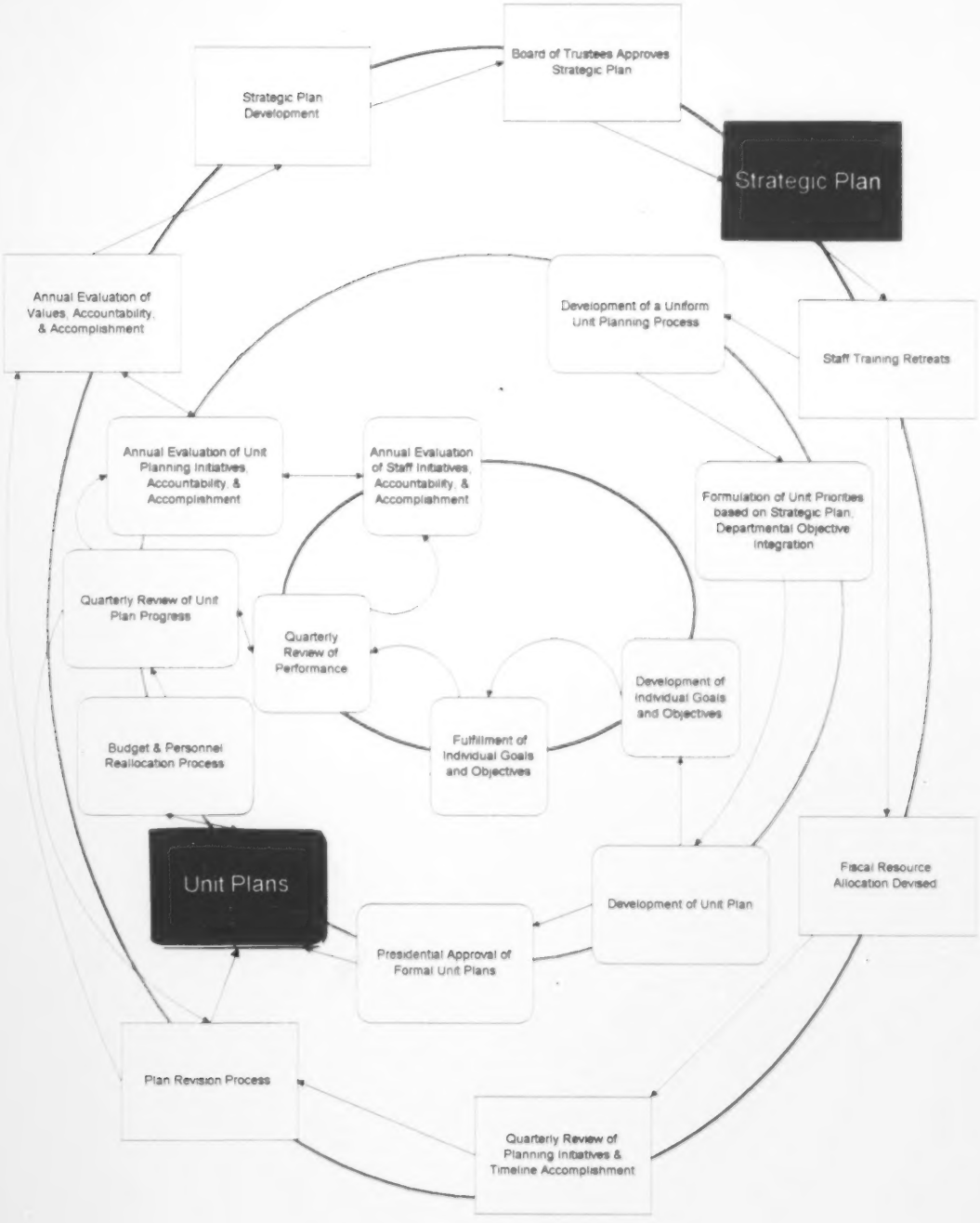
at the institutional level. Level #2, demonstrated by the middle circle, represents accountability at the unit level. Level #3, illustrated by the outer circle, represents accountability at an individual level.

For Salem Community College to achieve its vision, fulfill its mission, and embrace its values; all three levels of accountability and practice should be integrated and should work toward the advancement of the College. The 1999-2003 Strategic Plan represents the roadmap for the institution. The Unit Plans represent the direction individual functional areas must take to implement the Strategic Plan, and individual evaluation represents a measure of the practice and progress each member of Salem Community College makes to ensure that both Unit Plans and the 1999-2003 Strategic Plan are implemented. The three levels of accountability represent a synergistic relationship between the individual, his/her unit, and the College.

For Salem Community College to accomplish its goals, all members of the SCC community should realize their importance within this structure of accountability. Each member should be empowered to succeed at an individual, unit, and institutional level.

Figure #4

Three Levels of Accountability


Board of Trustees Approves Strategic Plan
Strategic Plan Development
Strategic Plan
Annual Evaluation of Values, Accountability, & Accomplishment
Development of a Uniform Unit Planning Process
Staff Training Retreats
Annual Evaluation of Unit Planning Initiatives, Accountability, & Accomplishment
Annual Evaluation of Staff Initiatives, Accountability, & Accomplishment
Formulation of Unit Priorities based on Strategic Plan, Departmental Objective Integration
Quarterly Review of Unit Plan Progress
Quarterly Review of Performance
Development of Individual Goals and Objectives
Budget & Personnel Reallocation Process
Fulfillment of Individual Goals and Objectives
Unit Plans
Development of Unit Plan
Fiscal Resource Allocation Devised
Presidential Approval of Formal Unit Plans
Plan Revision Process
Quarterly Review of Planning Initiatives & Timeline Accomplishment

Revised from Fogg, C. D. (1999). Implementing Your Strategic Plan. New York: AMACOM. p. 63.

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Creating A System of Change Through Leadership

Salem Community College can succeed in its efforts if proper leadership and staff developments are incorporated into its Unit Planning process. If outcome success is measured against past practice and national standards, the College may be able to challenge its existing status quo more effectively. The key to this is the understanding and implementation of a strategy of change that evolves the organization into a structure of emergent heterarchy. Hierarchical structures limit the role of leadership among those who do not possess power based on authority. "This is the true reason that top-down, hierarchical style of leadership is widely perceived as doomed to failure, even by those who aren't sure precisely why this should be so." (Hesselbein, et al., 1996, p. 22). Many articles on leadership practice implicitly suggest the need to incorporate heterarchical structural approaches into all administrative initiatives designed to transform modern organizations.

To challenge the decision making process currently in effect, there will be a need for increased leadership by the President, senior staff members, and other unit leaders; this leadership will need to transform many

practices from the form of top-down mandates into practices of change and empowerment. Finally, to challenge the process leaders are compelled to ask:

> Why do we cling to the view that only the top can initiate significant change? Is it our unwillingness to give up a familiar mental model? Is it the fear of stepping out of line without the imprimatur of the hierarchy? (Hesselbein et al., 1996, p. 42).

Each of Salem Community College's units can act as agents of change for Salem Community College, if they can practice emergent heterarchy.

Contemporary theories on leadership and organizational transformation demonstrate that any successful unit planning initiative needs to occur within a heterarchical structure with lateral processes and shared leadership. To fully inspire a shared vision of change at Salem Community College it will be necessary to present the objective findings of newly developed data within an historical context that does not violate the past tradition of the organization.

"The leader of the future, realizing that vision and implementation are both leadership roles, will learn to care little about defending the traditional hierarchy." (Hesselbein et al., 1996, p. 85). To be the leader of this change movement and the model of leadership in planning,

each unit should develop a vision of success that is incorporated in a shared decision making process between staff and leaders. This is the goal of the Unit Planning process, to facilitate an implementation strategy for planning at the unit level that fulfills the requirements of the newly articulated Strategic Plan and deconstructs the existing hierarchy. Leadership should emerge among many stakeholders.

To measure the effectiveness of current leadership practice, Worksheet #1 should be completed and discussed among all planners developing the Unit Plan. Shared leadership is essential to the implementation of the Strategic Plan.

Identifying Values and Organizational Culture

The identification of both an organizational and unit value set can provide a valuable framework for change and unit plan development. Culture and values can be both the greatest strength and weakness of an organization. As Figure #5 demonstrates, identifying values throughout the institution is essential for creating a culture that rewards strategic change.

The first step in transforming the organization to one that rewards change is the identification of values.

Leadership & Change

Worksheet #1: Creating Effective Change through Leadership[1]

Rate SCC with Agree, Neutral, or Disagree on each of the following:

_____ The leaders at SCC are committed to the employees they lead.

_____ The leaders of SCC believe that their employees' decisions, opinions, and suggestions are paramount for making positive change at the College.

_____ Our leaders constantly search for the latent positive and negative opinions of the staff by asking them for their opinion, what they feel about process, and for their feedback on change.

_____ When our leaders become aware of our feelings, they move quickly to address our feelings and/or suggestions, and they generally respond positively.

_____ Our leaders quickly identify problem areas and address them in a positive way.

_____ Our leaders ignite our passion for change by providing opportunities for personal and professional growth.

_____ Our leaders encourage change by incorporating all staff into the decision making processes.

_____ Our leaders find ways to make staff take responsibility for the development and encouragement of each other.

_____ Our leaders, lead by example.

_____ Our leaders study change prior to implementation, they do not make swift uninformed decisions.

_____ Our leaders spend their energy attempting to reach the goals of SCC, the units they lead, and the personal goals of their respective staff. They do not spend time trying to earn the loyalty of the staff.

_____ Our leaders set priorities for themselves, the College, and our unit.

_____ Our leader expects each of us (in the context of mutual responsibility) to set priorities for ourselves and our unit.

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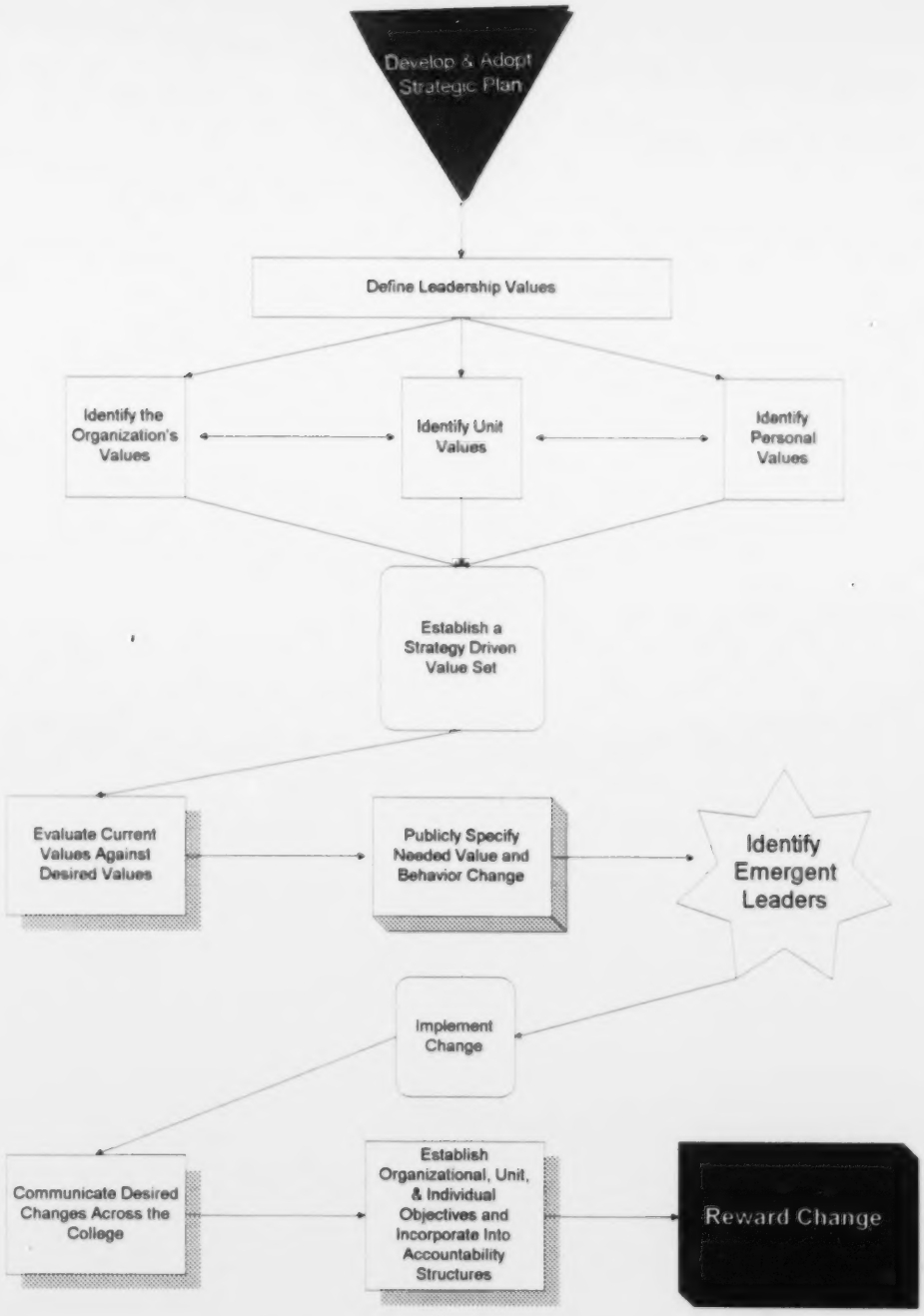
[1] *Revised from Lucas, J. (1997). Fatal Illusions. New York: American Management Association.*

Figure #5

Creating a Culture of Change


Develop & Adopt Strategic Plan
Define Leadership Values
Identify the Organization's Values
Identify Unit Values
Identify Personal Values
Establish a Strategy Driven Value Set
Evaluate Current Values Against Desired Values
Publicly Specify Needed Value and Behavior Change
Identify Emergent Leaders
Implement Change
Communicate Desired Changes Across the College
Establish Organizational, Unit, & Individual Objectives and Incorporate Into Accountability Structures
Reward Change

Revised from Fogg, C. D. (1999). Implementing Your Strategic Plan. New York: AMACOM. p. 253.

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Next the Unit Planning team should establish a set of strategic values for the unit (utilizing Worksheet#2 for this purpose). The current value set should be measured against the desired values, and the need for change should be stated publicly. Agents of culture change should be identified and a reward system that encourages change should be implemented and communicated.

Creating Change Through Empowerment

Organizational transformation can emerge only through the empowerment of all staff. As stated previously, leadership, planning, and change should be developed on the central principle of empowerment. "Empowerment is a popular word for a very old and important concept - defining and delegating responsibility, then holding people accountable for carrying out their responsibilities successfully." (Fogg, 1999, p. 279).

The staff at Salem Community College should be empowered to accomplish the goals of both the Unit and Strategic Plans; they should be included in the development of the planning initiatives. However, "within the business world, one frightening misconception about empowerment is that it gives people the freedom to do anything they want, any way they want, in order to get their jobs done." (Fogg,

Common Values

Worksheet #2: Identifying College and Unit Values[2]

1. What overall business are we in and what business are we likely to be in five years from now ?

2. What do we believe are our most important services?

3. What will our most important services be in the next five years?

4. Who are our most important customers, and why do we value them?

5. Why or how are our values different from our main competitors?

6. What values do we share with the rest of the college, and what are the values unique to our unit?

7. How do we think our unit will change over the next five years?

8. What one word sums up the culture of our unit, and in what way does it differ from the rest of the College?

9. How do we judge the unit's ultimate success? Why do we exist?

[2] *Revised from Juranski, J. (1993). Strategic Planning. New York: American Management Association.*

1999, p. 279). At Salem Community College empowerment gives staff the power to accomplish the goals established by the 1999-2003 Strategic Plan and the subsequent Unit Plans.

As Figure #6 demonstrates, priorities have been established through the participatory strategic planning process. The Unit Planning process is developed to facilitate the development of values and leadership practice, to encourage the creation of cross-functional relationships, and to create the Unit Plans. From the Unit Planning process, SCC can further empower action through the reallocation of existing resources to meet prioritized unit specifications and goals. Finally, the creation and implementation of the three level system of accountability is designed to ensure the empowerment of all staff. Worksheet #3 is designed to facilitate a discussion on empowerment and change needed to implement the 1999-2003 Strategic Plan.

Identifying the Business and Core Competencies

The identification and creation of a business definition, a competitive strategy, and key core competencies through process mapping will allow each unit

Figure #6

Empowerment for All

Develop Leadership Empowerment Values and a Personal Philosophy of Empowerment
Create Cross Functional Units & Teams to Empower them in their Work
Develop Unit Plans
Reallocate Resources Based on Empowerment and Unit Planning Specifications
Identify Appropriate Plans and Empower, Units, Teams, & People to Accomplish Goals that Promote Shared Values
Establish Unit Team & Individual Accountability Structures & Mechanisms

Revised from Fogg, C. D. (1999). Implementing Your Strategic Plan. New York: AMACOM. p. 284.

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Empowerment

Worksheet #3: Power to the People[3]

Rate SCC with Agree, Neutral, or Disagree on each of the following:

_____ The leaders at SCC are committed to the employees they lead.

_____ On a whole, the staff at SCC are willing to, and even eager to, abandon past practice rather than defend its value or pretend it was better than it ever was.

_____ Our staff refuses to allow past success to entrench them in directions, goals, or processes that will strangle the College in the future.

_____ Our leaders are willing to change structures, practices, systems, processes, procedures, and resources to support needed change.

_____ Our leaders plan to incorporate our ideas, thoughts, vision, and goals into the process of changing structures, practices, systems, processes, procedures, and resources which will allow SCC to be successful.

_____ Our leaders give our staff the opportunity to participate in the initiation and direction of internal change and the preparation of the College's response to external changes.

_____ SCC has abandoned the standard vertical, departmental, and hierarchical forms of organization, and is embracing more heterarchical, virtual, project and matrix based forms of organizational management.

_____ The College leadership discusses consequences (intended and unintended) thoroughly before making any decision or change.

_____ All employees understand the consequences of missed deadlines or opportunities.

_____ All employees have access to, are trained how to use, and pay close attention to the budgets and numbers.

_____ Everyone is free to question everything.

_____ All staff keeps abreast of the changes in the student population and their needs.

_____ At SCC, we assume that our problems aren't anyone's fault but our own.

---

[3] *Revised from Lucas, J. (1997). Fatal Illusions. New York: American Management Association.*

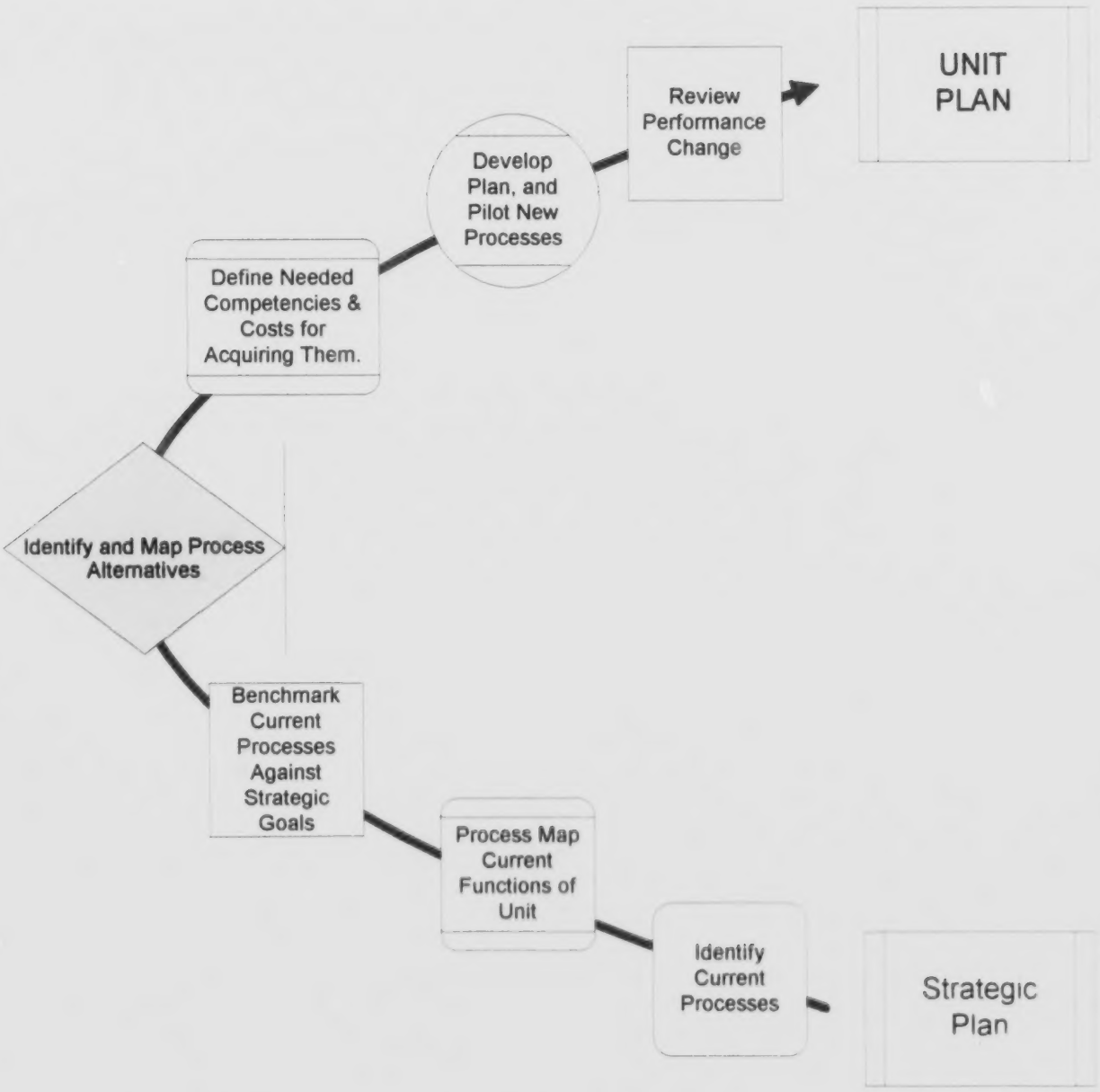
to understand its place within the organization, the degree to which change is possible, and its goals for the future. As Figure #7 demonstrates each unit should identify its current processes, map the related functions, benchmark the processes, map alternative actions, define needed competencies, plan and develop new processes, and review a change in performance.

Process mapping is not likely to be accomplished prior to the completion of a one-year unit plan, but the process should be considered and made part of the long-term goals of any formal Unit Plan. Process mapping will allow each department to streamline its current activities, discard useless or outdated practices, and become more deliberate in meeting both its strategic and operational goals.

Worksheet #4 is designed to assist the unit in establishing a list of core unit competencies, its business definition, and the skills that it needs collectively to provide exceptional service. Worksheet #5 can be used to begin a dialog about the nature of competition, skills needed for performance enhancement, and the value of measuring accomplishment against past performance (i.e., benchmarking).

Figure #7

Process Mapping the Unit


Identify Current Processes
Process Map Current Functions of Unit
Benchmark Current Processes Against Strategic Goals
Identify and Map Process Alternatives
Define Needed Competencies & Costs for Acquiring Them.
Develop Plan, and Pilot New Processes
Review Performance Change
Strategic Plan
UNIT PLAN

Revised from Fogg, C. D. (1999). Implementing Your Strategic Plan. New York: AMACOM. p. 326.

Core Competencies

Worksheet #4: Identifying Unit Competencies

1. What overall function does our unit serve and what functions are we likely to serve five years from now ?

2. What do we believe are our most important services?

3. What will our most important services be in the next five years?

4. Who are our most important customers, and can we serve them better?

5. Why or how are our skills different from those of our main competitors?

6. What skills and/or competencies do we share with the rest of the college, and what are the skills/competencies unique to our unit?

7. How do we think our unit will change over the next five years?

8. What one phrase sums up the skills needed to be successful in our unit?

9. What skills or competencies do we need to develop more fully over the next three years?

Keeping Up with the Jones's

Worksheet #5: Staying Ahead of the Competition[4]

Rate SCC with Agree, Neutral, or Disagree on each of the following:

_____ The leaders at SCC are committed to the employees they lead.

_____ Our leaders and staff often ask each other: "How can we make a paradigm shift?"

_____ Our leaders and staff often ask each other: "How can we invent our own rules?"

_____ Our leaders and staff often ask each other: "What makes us better and different?"

_____ Our leaders and staff often ask each other: "How do we invent our own game?"

_____ At SCC, we learn from many others, but do not intimidate any of them.

_____ At SCC, we work hard to create a college that is unlike any other.

_____ At SCC, we often choose to break the "traditional rules" of higher education that hold our organization back.

_____ At SCC, we don't let the difficulty of measuring ourselves hold us back.

_____ At SCC, we encourage our people to be different, and criticize groupthink.

_____ At SCC, we don't allow people to excuse poor performance by comparing it with that of others.

_____ At SCC, we are encouraged to measure our performance against ourselves, rather than other people or other organizations.

_____ At SCC, we compare our progress to date with where we want to be in six months, one year, and three years from now.

_____ At SCC, our leaders are committed to the success and growth of the College, and the staff.

_____ At SCC, our leaders evaluate us on the basis of our own previously established goals, rather than on comparisons with our peers.

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[4] *Revised from Lucas, J. (1997). Fatal Illusions. New York: American Management Association.*

Creating a System of Evaluation and Reward

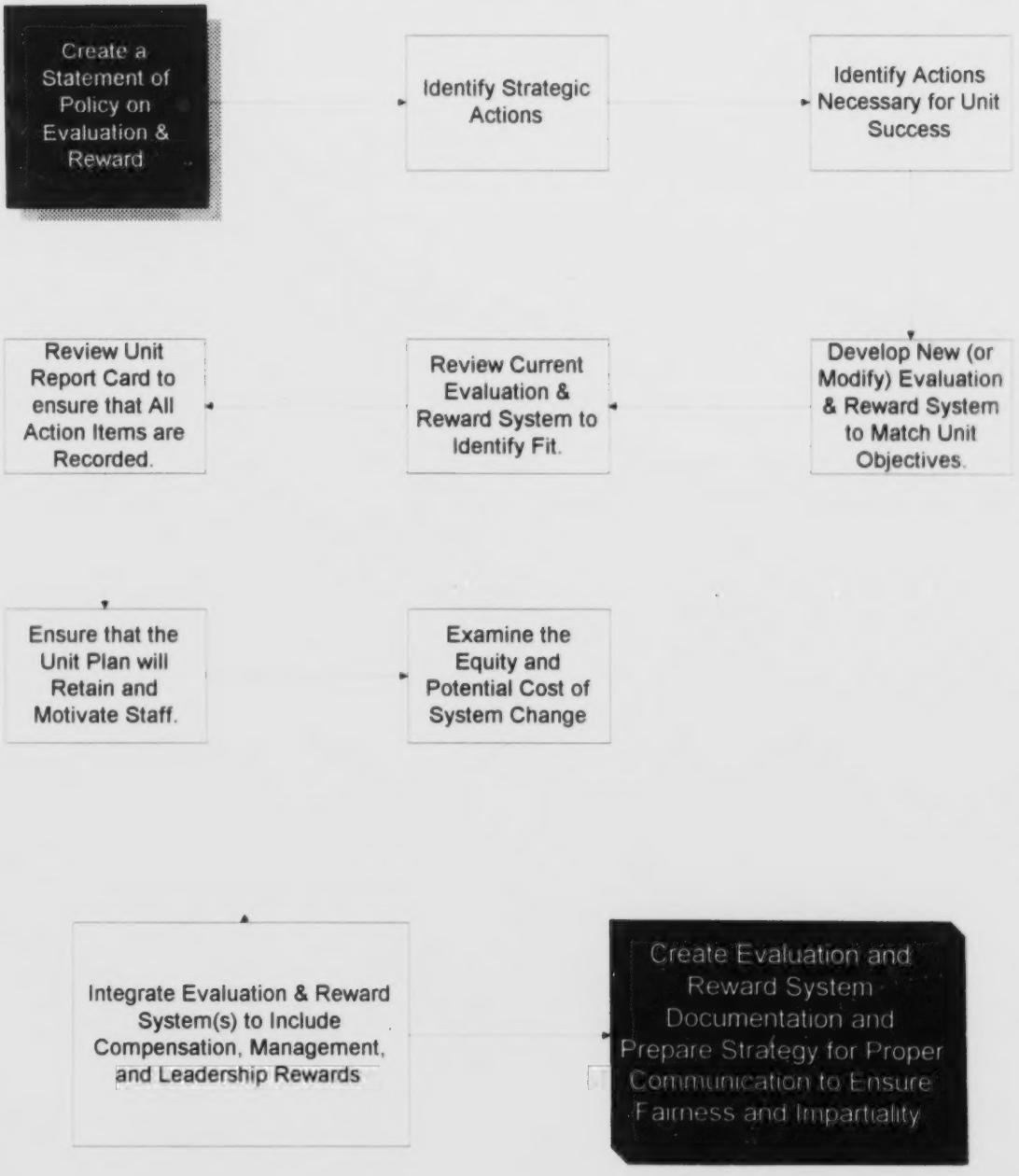
Developing a system of evaluation and reward based on the accomplishment of strategic initiatives is key to the successful implementation of the 1999-2003 Strategic Plan. Future staff evaluations should be developed through a process that encourages individual accountability for strategic results (i.e., integrating the three level system of accountability into the planning process, Figure #4). As Figure #8 demonstrates, a publicly articulated policy of evaluation and rewards based on strategic results should be defined and developed.

The College's programs for compensation increases (i.e., the Enrollment Incentive Increase and the Discretionary Salary Increase) represent a solid foundation for rewarding performance. The evaluation system used in the future should realize these programs and the College should continue to base additional compensation on performance.

The success of the evaluation and reward system will rely on the leadership and fairness demonstrated by the unit supervisor. Key to this is the realization that rewards come in many forms besides pay compensation, and that all evaluations should be developed based on the accomplishment of the Unit and Strategic Plans.

Figure #8

Creating A System to Reward High Performers


Create a Statement of Policy on Evaluation & Reward
Identify Strategic Actions
Identify Actions Necessary for Unit Success
Develop New (or Modify) Evaluation & Reward System to Match Unit Objectives.
Review Current Evaluation & Reward System to Identify Fit.
Review Unit Report Card to ensure that All Action Items are Recorded.
Ensure that the Unit Plan will Retain and Motivate Staff.
Examine the Equity and Potential Cost of System Change
Integrate Evaluation & Reward System(s) to Include Compensation, Management, and Leadership Rewards
Create Evaluation and Reward System Documentation and Prepare Strategy for Proper Communication to Ensure Fairness and Impartiality

Revised from Fogg, C. D. (1999). Implementing Your Strategic Plan. New York: AMACOM. p. 392

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Integrating Unit Functions with Strategic Initiatives

Finally, the key to successful plan implementation will rely on how effectively the unit plans are integrated with the strategic initiatives of the organization. Unit Plans should emerge from a context of shared decision-making and empowerment; and from the perspective of the vision, mission, values, and goals articulated within the 1999-2003 Strategic Plan. Each of Salem Community College's units should look to the Strategic Plan for guidance on daily practices and long-term strategic goals.

Additionally, each of the units, its members and managers, should realize the collegial relationship of their respective unit to all other functions, teams, and units throughout the College. Worksheet #6, The "Owed" Matrix, provides a framework for listing strategic actions, unit actions, and the interdependence between the unit, other College units, and other entities outside of the College. For Salem Community College to be successful, and for the implementation of the Strategic Plan to become a reality, all units must realize their interdependence and their relationship to the larger institution (as fully illustrated in the heterarchy in Figure #3).

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Worksheet #6: The "Owed" Matrix

STRATEGIC INSTITUTIONAL ACTION	Action Needed From Unit Staff*	Action Needed From Other Unit Staff*	Action Needed Form External Entity
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

* Be certain to name responsible parties as well as actions.

Conclusions and Recommendations

This Unit Planning Workbook was designed as a guide for developing unit plans that support and complement the 1999-2003 Strategic Plan. This workbook is also designed to serve as a management plan and strategy for implementing the 1999-2003 Strategic Plan.

As a management implementation plan, twenty key steps for change are documented (see Figure #1), and subdivided into five central areas:

6. Establish Accountability (Figure #4)
7. Adjust the Institution (Figure #7)
8. Teach Ourselves (Figure #5)
9. Empower All (Figure #6)
10. And, Evaluate & Reward (Figure #8)

Each of these theme areas serves as a guide for managing and implementing the long-term strategic plan implementation process. Simultaneously, through the completion of the worksheets and the realization and implementation of this management plan, each unit should be capable of producing a Unit Plan. The Unit Plan template is provided on the following pages to serve as a systematic uniform mechanism for all units to report their strategic and operational goals for the institution.

The Unit Planning Template

Direction Statement

In paragraph form address each of the following for your unit:

Unit Purpose Statement: What is the purpose for this unit? What is its reason for existing? Where do you want the unit to be in the future? What role will this unit play in the advancement of the college? What type of institutional enterprise would you like your unit to become?

Values: What are the values of your unit, what is important to your staff? What are the driving beliefs that define the culture of your unit? The culture you believe will produce the performance you desire and need to succeed.

Business Definition: A definition of the current and future business of your unit on important dimensions such as the curriculum, services, technology, customers, students, and markets.

Competitive Strategy: The student/customer needs that you plan to meet better than the competition.

Core Competencies: Those competencies, tangible and intangible, that you will leverage to gain a competitive advantage to fulfill your units purpose and achieve the college's vision.

Strategic Priority Actions

Strategic Plan: List those actions that you must address as defined by the strategic plan.

Unit Plan: List those issues that you must address as defined by your unit meetings, goals, values, and strategies.

Summary of Action Plans

Bullet point a summary of each action plan developed to address each of the strategic priority actions identified above (in no more than three sentences per action).

Unit Report Card

Develop the following table, wherever possible list goal objectives, timelines, and costs to the institution:

Delegated Strategic Institutional Priorities • List out those strategies from the strategic plan that your unit will need to address over the next three years.
Defined Unit Strategic Priorities • List out the strategic unit priorities to be completed within the next three years.
Unit Operating Objectives • List out the major operating priorities your unit expects to accomplish within the next year.
Unit Infrastructure Priorities • List out the infrastructure needs your unit anticipates over the next three years (i.e., personnel, equipment, major supplies, professional development expenditures, consultants, etc.)
Cross-Institutional Elements **Owe to Others** • List those items, products, or services that your unit will need to provide to other units to fulfill the strategic planning objectives, provide timelines. **Owed to Us** • List those items your unit will need from other units to fulfill the strategic planning objectives, provide timelines.

Team Participation & Development

- List any special intra- or inter-unit teams or committees that will need to be formed to complete your unit objectives.

Figures & Statistics

- Provide relevant statistical objectives for your unit for the time period provided below:

EXAMPLE*

	1997-98	1998-99	1999-00	2000-01	2001-02
ENROLLMENT (FTE):	730	720	780	850	990
RETENTION RATE:	39%	34%	35%	45%	56%
GRANT REVENUE:	$100,000	$130,000	$200,000	$250,000	$300,000
INSTIT. PASS RATE:	60%	60%	65%	70%	75%
CUST. TRAIN REV.:	$348,814	$400,000	$450,000	$500,000	$550,000
BOOK CIRCULATION:	25,656	24,890	28,000	30,000	35,000
COMPUTERS:	200	210	250	300	300

* Examples are not based on real data.

Strategy Summary

In paragraph form narrative; describe what you believe your unit will accomplish over the next year.

APPENDICIES

In very brief summaries describe any analytical work done prior to the completion of this plan.

APPENDIX A: Market Segments, Needs, and Strategy

APPENDIX B: Strategic Data, Options, and Choices

APPENDIX C: Explication of Unit Meetings and Decision-Making Strategy

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For additional information or clarification of material contained in this workbook please contact:

Mr. William Austin, Director
Office of Institutional Research & Planning
Salem Community College
460 Hollywood Avenue
Carneys Point, NJ 08069

Phone: (856) 351-2607
Fax: (856) 351-2634
E-mail: austin@willie.salem.cc.nj.us

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